

MISCELLANEOUS CalPERS MEMBERS
REQUESTING RETIREMENT ESTIMATE(S)
AND PRINTING OF PAYROLL/PERSONNEL SCREENS

The purpose of this form is to request an estimate of retirement allowances. This estimate will be completed by the City of Long Beach Retirement Counselor. This form is not an application for retirement.

Part I – Employee Information (please print)

Name _____	Social Security Number _____	Date of Birth _____ / ____ / ____
Work Phone _____	Home Phone _____ ()	Department/Bureau/Division _____

Part 2 – Estimate Information

Type of Estimate for Retirement Allowance: ☐ Service ☐ Disability

Projected Retirement Dates (Please put month, day, and year)

1) _____ / ____ / ____	2) _____ / ____ / ____	3) _____ / ____ / ____
month day year	month day year	month day year

A) Beneficiary's Date of Birth (optional, used to calculate option amounts for pension) _____ / ____ / ____

B) Were you ever a CalPERS retiree receiving a pension check? ☐ Yes ☐ No

C) Did you work at any time as a CalPERS Safety member? ☐ Yes ☐ No

D) Were you a CalPERS member prior to 07/01/82? ☐ Yes ☐ No

E) Have you worked for another agency covered by CalPERS? ☐ Yes ☐ No

F) Is there a community property claim against your retirement benefits? (If yes, refer to Part 4A) ☐ Yes ☐ No

G) Have you worked LESS THAN full time/full pay since 06/30/02? ☐ Yes ☐ No

H) How do you want the estimate sent? ☐ Interoffice-Conf. ☐ Mailed to Home ☐ Call when ready (ext. _____)

Part 3 – Survivor Continuance Information

A) Will you have been married at least one year prior to your tentative retirement date? ☐ Yes ☐ No

B) Do you have any unmarried children (natural or adopted) who are under age 18? ☐ Yes ☐ No

C) Do you have any unmarried children who were disabled prior to age 18 & are still disabled? ☐ Yes ☐ No

D) Are either or both of your parents dependent on you for at least one-half of their support? ☐ Yes ☐ No

Part 4 – Notes

A) If there is a community property claim against your retirement benefits you will need to request an estimate from CalPERS. You may request a "CalPERS Retirement Allowance Estimate Request" form from the City Retirement Counselor at (562) 570-6703 or access the CalPERS website at www.calpers.ca.gov or the City Website at www.longbeach.gov/hr.

B) Do you need forms to request additional CalPERS service credit which you may be eligible (e.g. military service, service prior to membership, redeposit of refunded member contributions, etc.) ☐ Yes ☐ No

YOU MUST NOW READ AND SIGN THE DISCLAIMER ON THE NEXT PAGE

DISCLAIMER

The retirement estimate program, which will be used by the City's Retirement Counselor to estimate your CalPERS Retirement Allowance, will be based on the information you provide on this form. The City's Retirement Counselor may, if necessary, access information maintained by CalPERS on your benefit formula(s), service credit, or salary history. CalPERS and THE CITY OF LONG BEACH ARE NOT RESPONSIBLE FOR THE ACCURACY OF ANY ESTIMATE PRODUCED BY THIS PROGRAM.

I have read the above disclaimer and understand that any retirement estimate I am given by an employee of the City of Long Beach is a rough estimate and its accuracy cannot be guaranteed.

Signature

Date

Forward completed form to:

**Mary Eme, Retirement Counselor
Human Resources, 13th Floor
or Fax (562) 570-5375**